# USDA Weekly Retail Turkey Feature Activity

Fri. Apr 19, 2013

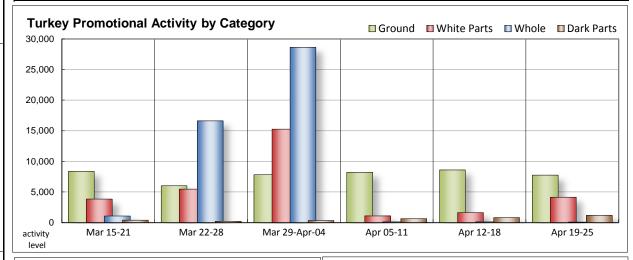
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 04/19 thru 04/25.

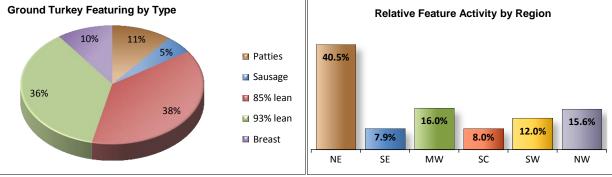
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY											
	THIS	WEEK		WEEK	LAST YEAR						
Feature Rate 1/		of 23,200		of 23,200	32.1% of 22,500 outlets						
		tlets		tlets							
Special Rate 4/		0%		.5%	0.6%						
Activity mack		,030		,830		,330					
3/ WHOLE BIRDS:	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg					
Fresh - Hens											
" - Toms											
Frozen - Hens	40	0.99	80	0.55							
" - Toms	40		30								
PARTS:	10	0.00	- 00	1.10							
Breast:											
Bone-in, whole											
Fresh	20	2.49	250	2.96							
Frozen	900	1.85	370	1.73	330	1.79					
Split, bone-in											
Fresh											
Rotisserie	2,570	8.72	430	8.36	770	7.84					
Boneless, whole			10	4.99	230	4.24					
Cutlets	360	4.92	440	5.03	800	5.08					
Cutlets, thin sliced	100	4.99			110	5.05					
Strips					20	3.99					
Tenders	190	4.99	120	3.92	530	4.88					
Marinated Tenders	620	4.28	70	4.19	620	4.47					
Drumsticks	190	1.80	170	1.68	170	1.99					
Thighs	10	1.99	10	1.99	260	1.92					
Wings	270	2.09	160	1.69	200	1.87					
Necks	180	1.79	60	1.71	40	1.40					
Smoked Drumsticks	170	2.01	160	2.08	30	1.99					
Smoked Wings	180	1.99	180	2.07	30	1.99					
Smoked Necks	160		70								
GROUND TURKEY:	7,750		8,590		5,460						
Patties	830		750		400						
Sausage	380		1,010		1,460						
85% lean	2,940		2,190		920						
93% lean	2,830		3,210		1,560						
Breast	770		1,430		1,120						
Rolls (frsh/frz 1 lb.)	30	2.49	490	2.43	160	2.52					
Specialty <sup>5/</sup> Patties	30	4.74	300	4.83	20	4.99					
93-94% lean	190		810		310						
Breast	30		30		240						
Note: rolls & specialty no											

This Week's Turkey Feature Highlights

Feature activity on turkey continues to increase for the second week in a row. Offerings of whole turkeys are seasonally light. Instead retailers turn their attention to frozen bone-in breasts; ads are plentiful and values are higher. Rotisserie breasts haven't seen this much ad space in a long time; why not plan a hot meal without all the prep time? Retailers are finally showing more interest in boneless white parts; featuring is heaviest on marinated tenders, providing another choice for an easy meal item. The number of ads for dark parts increases; prices are mixed. Fewer stores promote ground turkey and the weighted average price is lower. Promotional activity on 85% lean edges ahead of the 93% lean; prices are unchanged to lower. Market activity slows on deli items. Service deli offerings decrease on turkey, increase on chicken. Self-service deli offerings decline on all items; prices are mostly higher on processor labels, lower on private labels.





All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/ Feature Rate: the amount of sampled stores advertising <u>any</u> reported turkey item during the current week, expressed as a percentage of the total sample. 2/ Activity Index: a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). 3/ Stores/Avg: the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. 4/ Special Rate: the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.) 5/ Specialty: products produced from birds raised on an all vegetable diet without antibiotics and minimally processed.

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Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 04/19 thru 04/25.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	NORTI	HEAST U.S.			SOUT	HEAST U.S.		MIDWEST U.S. (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)			
	(CT,DE,MA,MD,M	IE,NH,NJ,NY,PA,F	RI,VT)	(,	AL,FL,GA,M	S,NC,SC,TN,VA,\	VV)				
Feature Rate 1/		0 sampled outle	`		00 sampled outl	,	41.2% of 4,200 sampled outlets 2.2% of stores w/ no-price promotions  Activity Index = 2,390  Price Range Summary				
Special Rate 4/	0.6% of stores w	•		•	v/ no-price prom						
Activity Index 2/		Index = 6,660	''''		Index = 1,780	01.01.0					
Activity index	Price Range	Summar	Price	Range	Summa	arv/					
	(\$/pound)	Stores Wtd Avg		(\$/pound)		Stores Wtd Avg		(\$/pound)	Stores Wtd Avg		
WHOLE BIRDS:											
Fresh - Hens											
" - Toms											
Frozen - Hens											
" - Toms PARTS:											
Breast:											
Bone-in, whole											
Fresh	2.49	10	2.49								
Frozen	2.49 1.48 - 2.49	530	2.49	1 1/2	- 1.69	220	1.49	1.49 - 1.79	130	1.77	
Split, bone-in	1.40 - 2.49	330	2.02	1.40	- 1.03	220	1.43	1.43 - 1.73	130	1.77	
Fresh											
Rotisserie	5.00 - 9.99	1,070	7.35	7 99	- 9.99	130	8.67	9.99	10	9.99	
Boneless, whole	0.00 0.00	1,070	7.00	7.00	0.00	100	0.07	0.00		0.00	
Cutlets	3.99 - 5.49	350	4.95								
	3.88 - 3.48	330	4.93					4.00	100	4.00	
Cutlets, thin sliced								4.99	100	4.99	
Strips	4.00	100	4.00								
Tenders	4.99 4.26	190 520	4.99		4.06	70	4.06				
Marinated Tenders Drumsticks	1.99	10	4.26 1.99		4.26	70	4.26	1.79	180	1.79	
	1.99	10	1.99					1.79	100	1.79	
Thighs	1.88 - 2.99	70	2.62		2.99	20	2.99	1.79	180	1.79	
Wings Necks	1.00 - 2.99	70	2.02		2.99	20	2.99	1.79	180	1.79	
Smoked Drumsticks	1.99	150	1.99		2.29	10	2.29	1.79	100	1.79	
Smoked Wings	1.99	150	1.99	1 60	- 2.29	20	1.99	1.99	10	1.99	
Smoked Necks	1.99	150	1.99	1.09	2.29	10	2.29	1.99	10	1.99	
GROUND TURKEY:	1.99	150	1.99		2.29	10	2.29				
Patties	2.99 - 4.49	480	3.45		3.50	50	3.50	3.33 - 4.00	240	3.84	
Sausage	2.63 - 4.16	180	3.43	2 90	- 3.59	90	3.31	2.79 - 3.99	60	3.45	
85% lean	2.33 - 3.84	960	2.86		- 3.07	850	2.48	2.79 - 3.99	630	2.41	
93% lean	2.76 - 3.99	1,360	3.37		- 3.49	110	3.31	2.49 - 3.75	600	3.30	
Breast (99-100% lean)	3.84 - 5.49	240	5.21		3.84	200	3.84	3.69 - 3.99	20	3.86	
Rolls (frsh/frz 1 lb.)	0.0.	2.0	J.L.1		0.01	200	5.01	2.48	20	2.48	
Specialty 5/											
Patties	4.49 - 5.99	30	4.74								
93-94% lean	3.99 - 4.99	170	4.47					3.69	20	3.69	
Breast	5.00 - 6.99	30	5.75								

# **USDA Weekly Retail Turkey Feature Activity**

Fri. Apr 19, 2013

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 04/19 thru 04/25.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	SOUTH	CENTRAL U.S.		SOUT	HWEST U.S.	NORTHWEST U.S.  (AK,ID,MT,OR,WA,WY)  52.0% of 1,200 sampled outlets  0.0% of stores w/ no-price promotions  Activity Index = 700			
	(AR,AZ,CO,KS,	LA,MO,NM,OK,TX	(,UT)	(0	CA,HI,NV)				
Feature Rate 1/	27.6% of 4,2	00 sampled outle	ts	43.5% of 2,9	00 sampled outle				
Special Rate 4/	0.0% of stores v	v/ no-price promo	tions	0.0% of stores	w/ no-price promo				
Activity Index 2/	Activity	Index = 1,200		Activity	/ Index = 1,300				
·	Price Range	Summar	у	Price Range	Summary		Price Range	Summai	ry
	(\$/pound)	Stores V	Vtd Avg	(\$/pound)	Stores V	Vtd Avg	(\$/pound)	Stores \	Ntd Avg
WHOLE BIRDS:									
Fresh - Hens									
" - Toms									
Frozen - Hens	0.99	40	0.99						
" - Toms	0.99	40	0.99						
PARTS:	0.00		0.00						
Breast:									
Bone-in, whole									
Fresh				2.49	10	2.49			
Frozen	1.49	10	1.49			20	1.88	10	1.88
Split, bone-in									
Fresh									
Rotisserie	8.99 - 9.99	350	9.98	7.99 - 9.99	680	9.62	9.99	330	9.99
Boneless, whole	0.00		0.00	1.00 0.00	000	0.02	0.00	000	0.00
Cutlets	3.99	10	3.99						
	3.99	10	3.99						
Cutlets, thin sliced									
Strips									
Tenders									
Marinated Tenders							4.66	30	4.66
Drumsticks									
Thighs									
Wings									
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties	3.50 - 4.00	50	3.94	3.99	10	3.99			
Sausage	2.99 - 3.19	20	3.04	3.27	10	3.27	3.19 - 3.33	20	3.27
85% lean	2.00 - 2.39	210	2.34	2.39	20	2.39	2.33 - 3.19	270	3.00
93% lean	2.08 - 2.99	410	2.91	2.95 - 3.99	310	3.24	2.79 - 3.19	40	3.11
Breast (99-100% lean)	4.15 - 4.39	60	4.33	4.79	250	4.79			
Rolls (frsh/frz 1 lb.)				2.50	10	2.50			
Specialty <sup>5/</sup>									
Patties									
93-94% lean									
Breast	Marketing Service Live								



### **USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats**

Fri. Apr 19, 2013

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 04/19 thru 04/25.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	N	ATIONAL	SUMMAR	Υ			NORTHEAST U.S.		SOUTHEAST U.S.				
	This	Week	Last	Week	Last	Year	(CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)		(AL,FL,GA,MS,N	(AL,FL,GA,MS,NC,SC,TN,VA,WV)			
	67.0% o	f 23,200	75.2% o	f 23,200	66.3% o	f 22,500							
Feature Rate 1/	sto	res	sto	res	sto	res	81.3% of 4,600 sampled outlets			73.1% of 6,100 sampled outlets			
Activity Index 2/	42.	680	51,	170	42	E40	Activity I	Activity Index = 13,420			Activity Index = 8,810		
Activity Index 2/	42,	000	51,	170	43,	510	Price Range	Summ	nary	Price Range	Summary		
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	(\$/pound)	Stores	Wtd Avg	(\$/pound)	Stores \	Ntd Avg	
SERVICE DELI - Turkey													
Category 1													
Processor Brand	3,570	8.07	3,840	8.08		8.06		1,660	8.24	6.99 - 8.99	920	8.01	
Private Brand	1,340	7.65	2,850	7.61	2,440	7.74	6.99 - 8.99	1,140	7.59	7.49	110	7.49	
Category 2													
Processor Brand	4,500	5.77	4,920	5.90		6.20		1,220	6.12	4.99 - 6.99	1,040	5.90	
Private Brand	5,190	7.07	7,200	7.47	2,040	7.01	4.99 - 7.99	1,300	6.28	6.49 - 7.99	190	6.99	
Category 3	000	0.00	000	4 4 4	4 400	4.40	0.00 4.00	050	4.45	0.00	40	0.00	
Processor Brand	800	3.80	920	4.11	1,130	4.12		250	4.15	3.99	10	3.99	
Private Brand Turkey Ham	190	5.52	230	4.55	2,830	4.95	3.88 - 5.48	70	4.87				
Processor Brand	200	3.52	480	4.08	240	3.11	2.99 - 3.99	110	3.92				
Private Brand	200	3.32	400	4.00	240	3.11	2.99 - 3.99	110	3.92				
Turkey Pastrami													
Processor Brand	480	4.21	580	4.45	190	4.14	3.79 - 4.99	260	4.10				
Private Brand	400	7.21	300	4.40	130	7.17	3.75 - 4.55	200	4.10				
SERVICE DELI - Chicken													
Category 1													
Processor Brand	4,660	7.79	2,810	7.41	2,150	7.58	5.90 - 9.99	2,350	8.32	6.99 - 8.49	1,300	7.10	
Private Brand	1,320	7.73	1,080	8.00	-	7.06		570	7.65	6.99	70	6.99	
Category 2	1,020	7.20	1,000	0.00	040	7.00	0.55 - 0.45	310	7.00	0.55	70	0.55	
Processor Brand	320	5.02	70	5.24	490	6.40	4.99 - 5.99	280	5.01				
Private Brand	520	6.76	260	5.87	160	5.99		30	5.88	6.49	10	6.49	
SELF-SERVICE DELI	020	0.70	200	0.01	100	0.00	0.00	- 00	0.00	0.10		0.10	
(dollars per tub or pouch)													
Turkey 7-10 oz													
Processor Brand	8,310	3.17	9,890	2.85	7,480	3.00	2.50 - 3.99	1,550	3.40	2.00 - 3.79	2,420	3.22	
Private Brand	1,020	2.64	2,280	3.18	3,730	2.75	2.50 - 3.33	390	2.95	2.50	40	2.50	
Turkey 16 oz													
Processor Brand	1,020	5.10	1,700	5.51	380	5.85	4.49 - 5.99	370	4.86	4.99 - 5.99	240	5.74	
Private Brand	170	4.99											
Chicken 7-10 oz													
Processor Brand	8,110	3.18	9,800	2.85	6,620	2.97		1,540	3.40	2.00 - 3.79	2,420	3.22	
Private Brand	960	2.61	2,260	3.18	3,320	2.77	2.50 - 3.33	330	2.94	2.50	40	2.50	

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)



#### **USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats**

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 04/19 thru 04/25.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	MIDW	EST U.S.	SOUTH CI	ENTRAL U.S.	SOUTHW	/EST U.S.	NORTHWEST U.S.  (AK,ID,MT,OR,WA,WY)  64.2% of 1,200 sampled outlets  Activity Index = 2,100		
	(IA,IL,IN,KY,MI,MI	N,ND,NE,OH,SD,WI)	(AR,AZ,CO,KS,LA	A,MO,NM,OK,TX,UT)	(CA,F	HI,NV)			
Feature Rate 1/	69 6% of 4 200	) sampled outlets	49.1% of 4.200	) sampled outlets	54.2% of 2.900 s	sampled outlets			
		ndex = 9,660	•	ndex = 4,870	·	dex = 3,820			
Activity Index 2/	Price Range	Summary	Price Range	Summary	Price Range	Summary	Price Range Summary		
	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	
SERVICE DELI - Turkey	\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\	Ŭ	( ) /		\.\.\ <i>\</i>	Ŭ	(,1,		
Category 1									
Processor Brand	5.95 - 10.99	570 7.45	6.48 - 9.99	340 8.28			6.99 - 12.99	80 8.76	
Private Brand	7.49 - 10.99	70 8.75	7.99	20 7.99					
Category 2									
Processor Brand	4.89 - 6.99	1,490 5.59	4.69 - 5.99	560 5.50	4.99	170 4.99	4.98	20 4.98	
Private Brand	4.48 - 7.99	1,190 6.36	5.99 - 7.49	950 7.57	6.99 - 8.99	1,090 8.02	7.49 - 7.99	470 7.85	
Category 3									
Processor Brand	2.99 - 4.99	210 3.27	2.99 - 4.49	330 3.85					
Private Brand				120 5.91					
Turkey Ham Processor Brand	3.29 - 3.49	20 3.41	4.99	10 4.99	2.49 - 2.99	60 2.60			
Private Brand	3.29 - 3.49	20 3.41	4.99	10 4.99	2.49 - 2.99	00 2.00			
Turkey Pastrami									
Processor Brand	3.29	10 3.29	3.99 - 4.99	200 4.46	2.99	10 2.99			
Private Brand	3.29	10 3.29	3.99 - 4.99	200 4.40	2.99	10 2.99			
SERVICE DELI - Chicken									
Category 1  Processor Brand	5.95 - 7.49	470 6.87	5.99 - 8.49	450 7.59	6.49 - 10.99	90 10.02			
Private Brand	5.99 - 7.99	470 6.62	7.99	20 7.99	7.99	40 7.99	7.49 - 7.99	150 7.54	
Category 2	0.00 - 1.00	470 0.02	7.55	20 7.55	7.55	40 7.55	7.45 - 7.55	150 7.54	
Processor Brand	3.99 - 5.98	30 5.10	4.99	10 4.99					
Private Brand	3.89 - 6.98	280 6.34					7.49	200 7.49	
SELF-SERVICE DELI									
(dollars per tub or pouch)									
Turkey 7-10 oz									
Processor Brand	2.00 - 4.00	1,790 2.98	2.00 - 2.99	930 3.01	2.49 - 3.50	1,030 3.09	2.69 - 3.99	590 3.32	
Private Brand	2.19 - 3.69	580 2.43	2.99	10 2.99					
Turkey 16 oz									
Processor Brand	4.29 - 5.78	160 4.90	3.95 - 5.49	70 4.87	4.99	180 4.99			
Private Brand					4.99	170 4.99			
Chicken 7-10 oz									
Processor Brand	2.00 - 4.00	1,740 2.99	2.00 - 3.00	840 3.02	2.50 - 3.50	980 3.12	2.69 - 3.99	590 3.32	
Private Brand	2.19 - 3.69	580 2.43	2.99	10 2.99					

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)